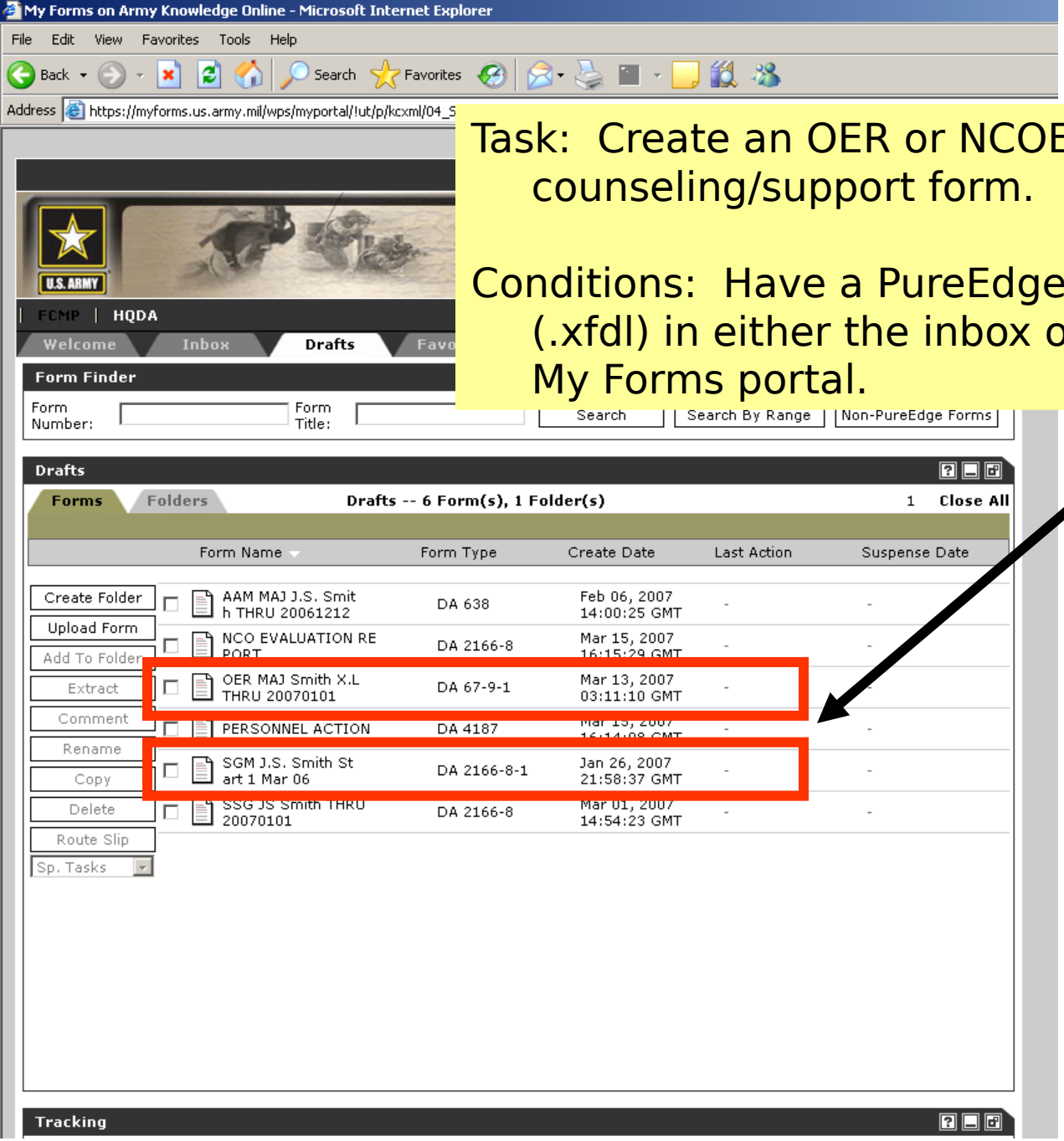
Specific Training

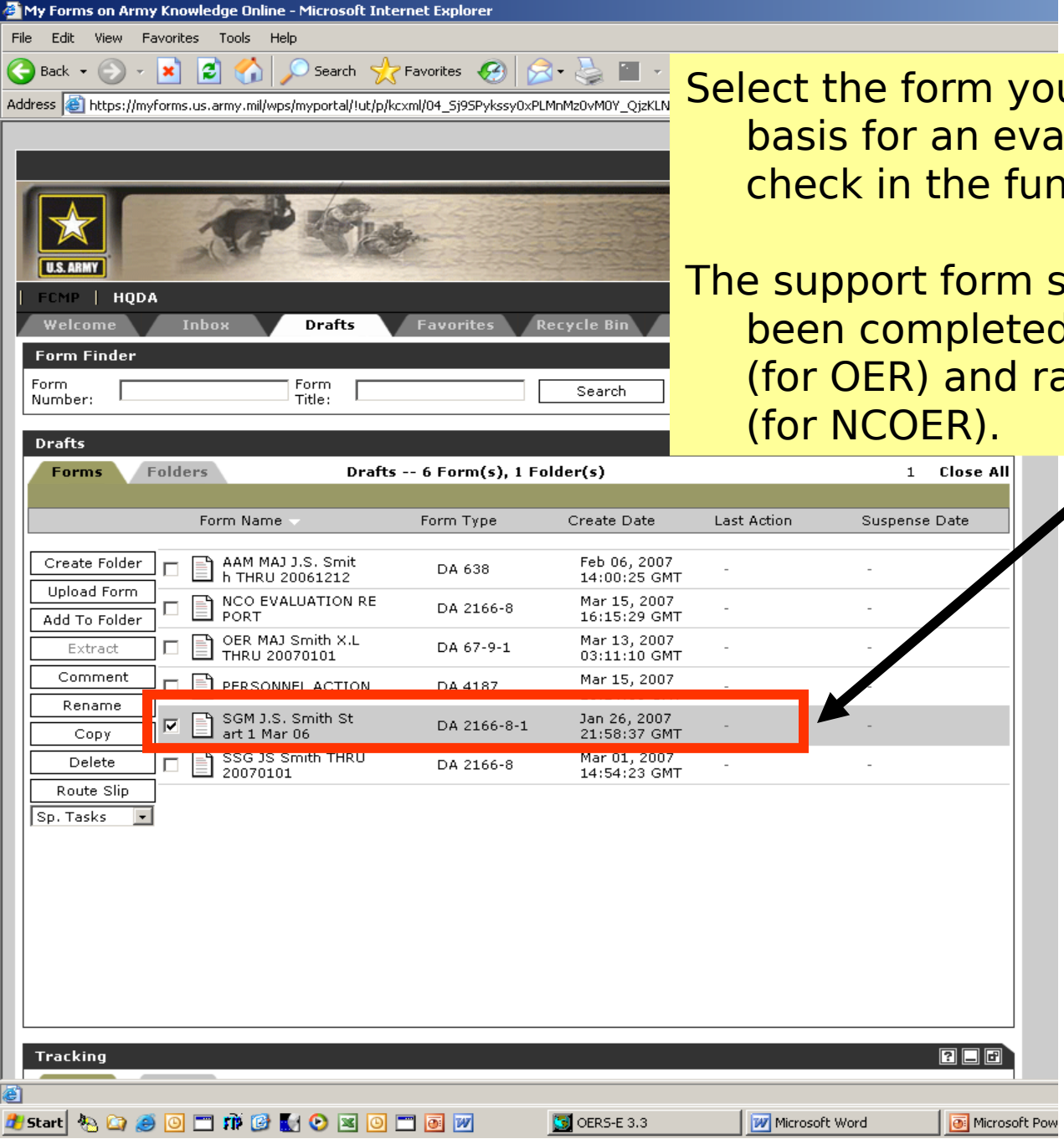
Section H:
Create OER or NCOER from counseling/support form

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
As of: 7 Apr 08



Task: Create an OER or NCOER from a counseling/support form.

Conditions: Have a PureEdge OER or NCOER (.xfdl) in either the inbox or drafts box of My Forms portal.



Select the form you want to use as the basis for an evaluation by placing a check in the functions box.

The support form should be one which has been completed by the rated Soldier (for OER) and rater and rated Soldier (for NCOER).

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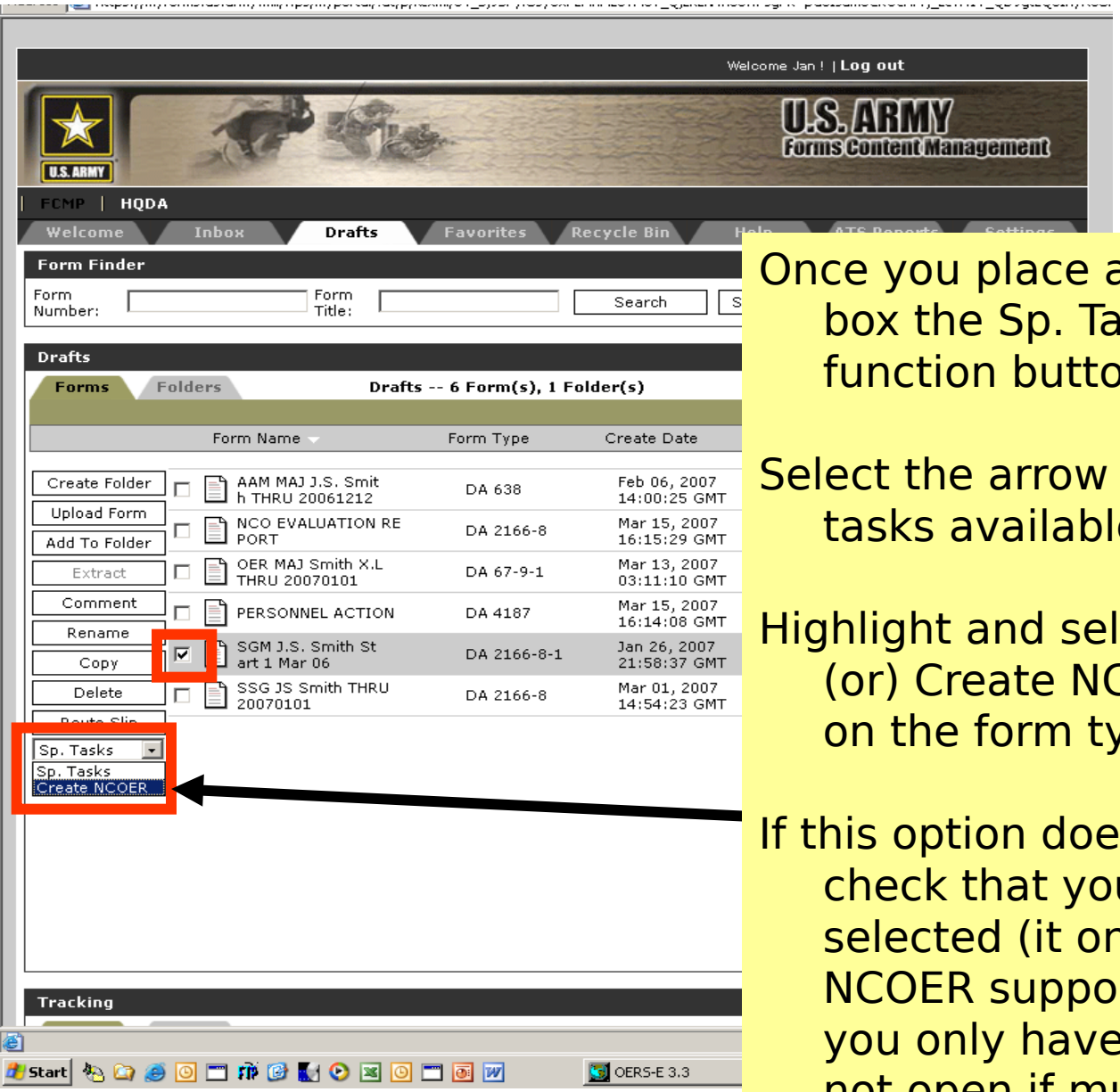
As of: 7 Apr 08

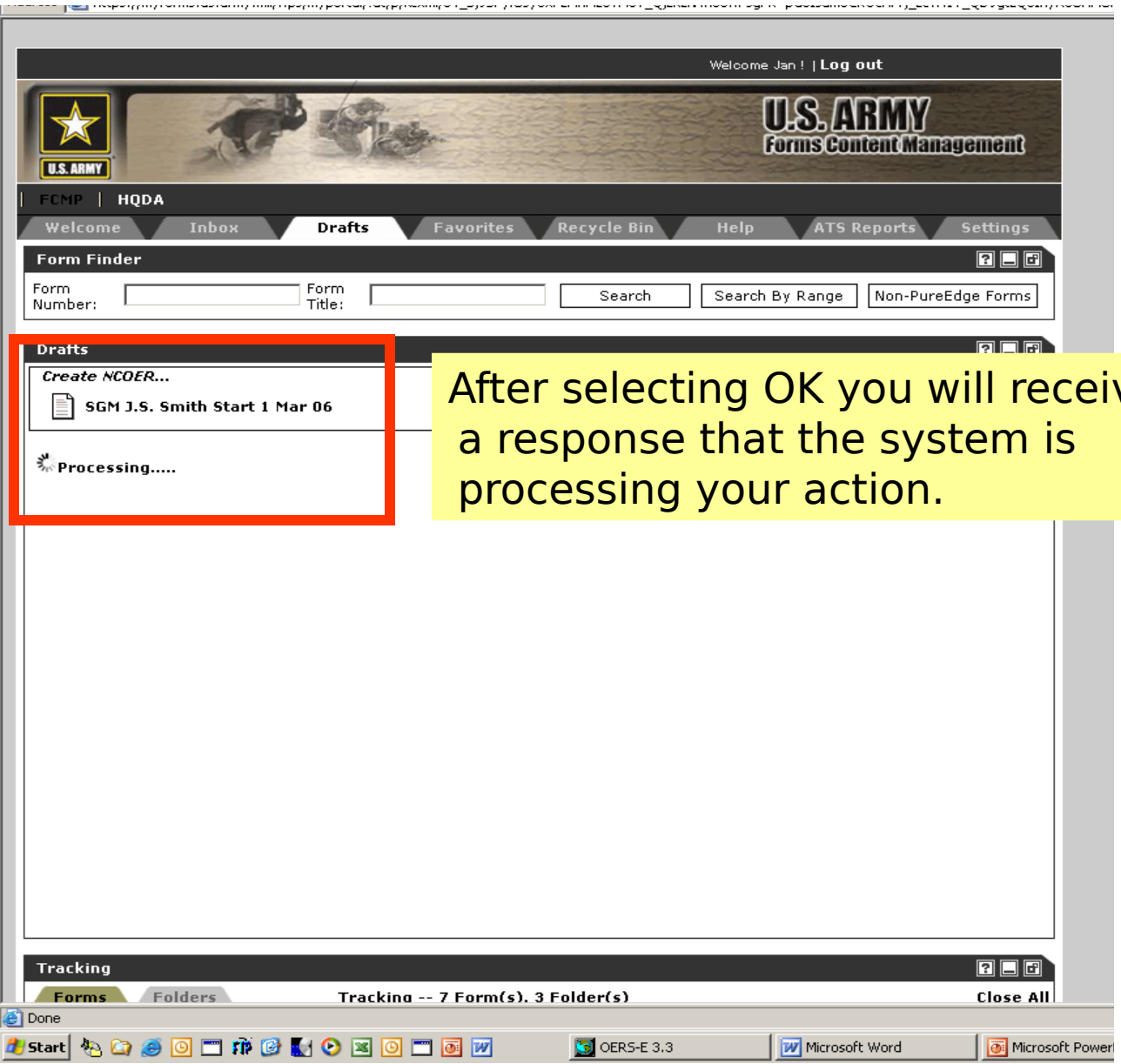


Once you place a check in the functions box the Sp. Tasks (Special Tasks) function button will activate.

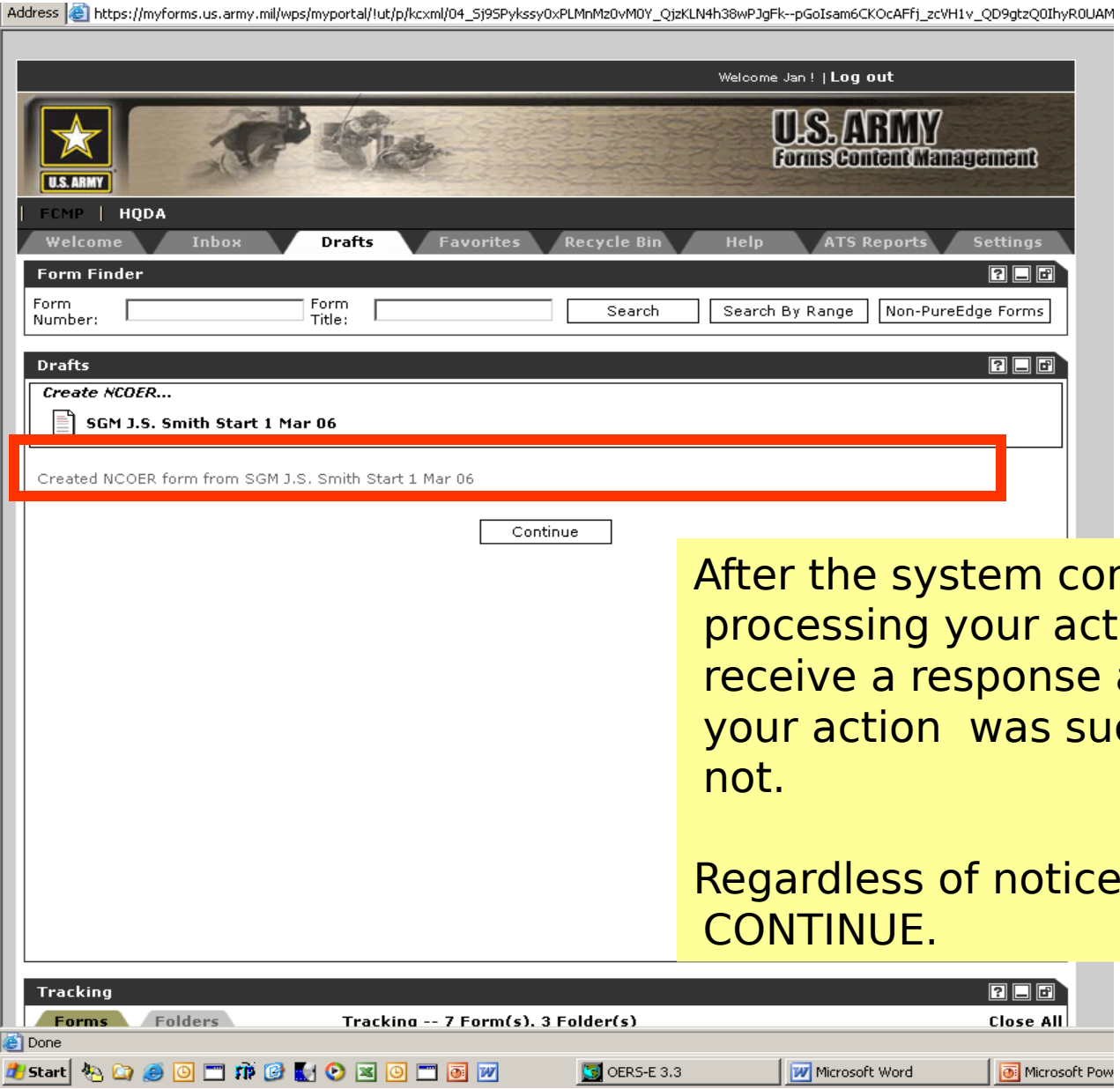
Select the arrow button to show the special tasks available for this particular form.

Highlight and select the task Create OER (or) Create NCOER. The option depends on the form type you have selected.

If this option does not become available check that you have the right form selected (it only works for OER or NCOER support forms) and check that you only have 1 form selected (it will not open if multiple forms are selected).

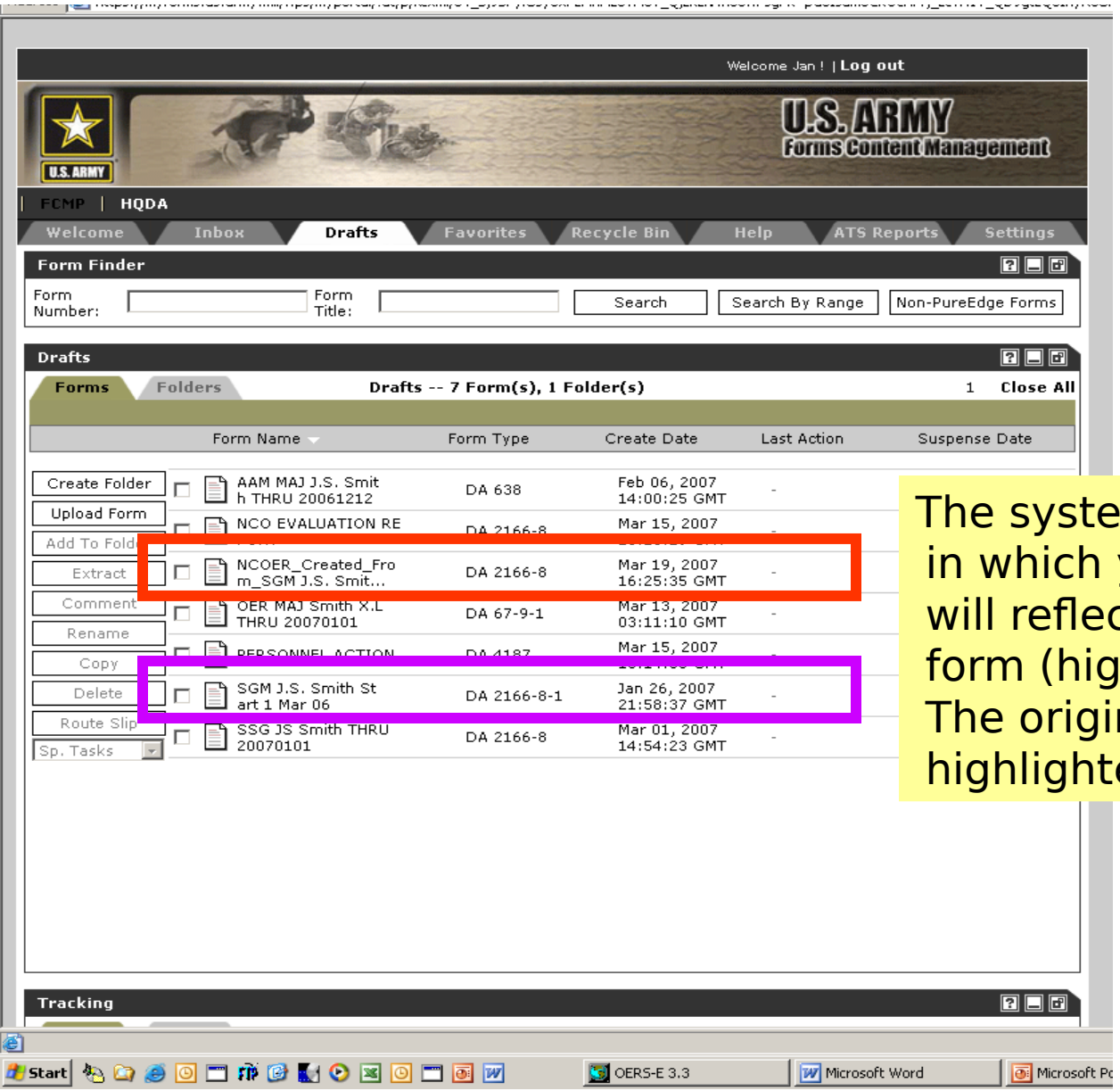


After selecting OK you will receive a response that the system is processing your action.

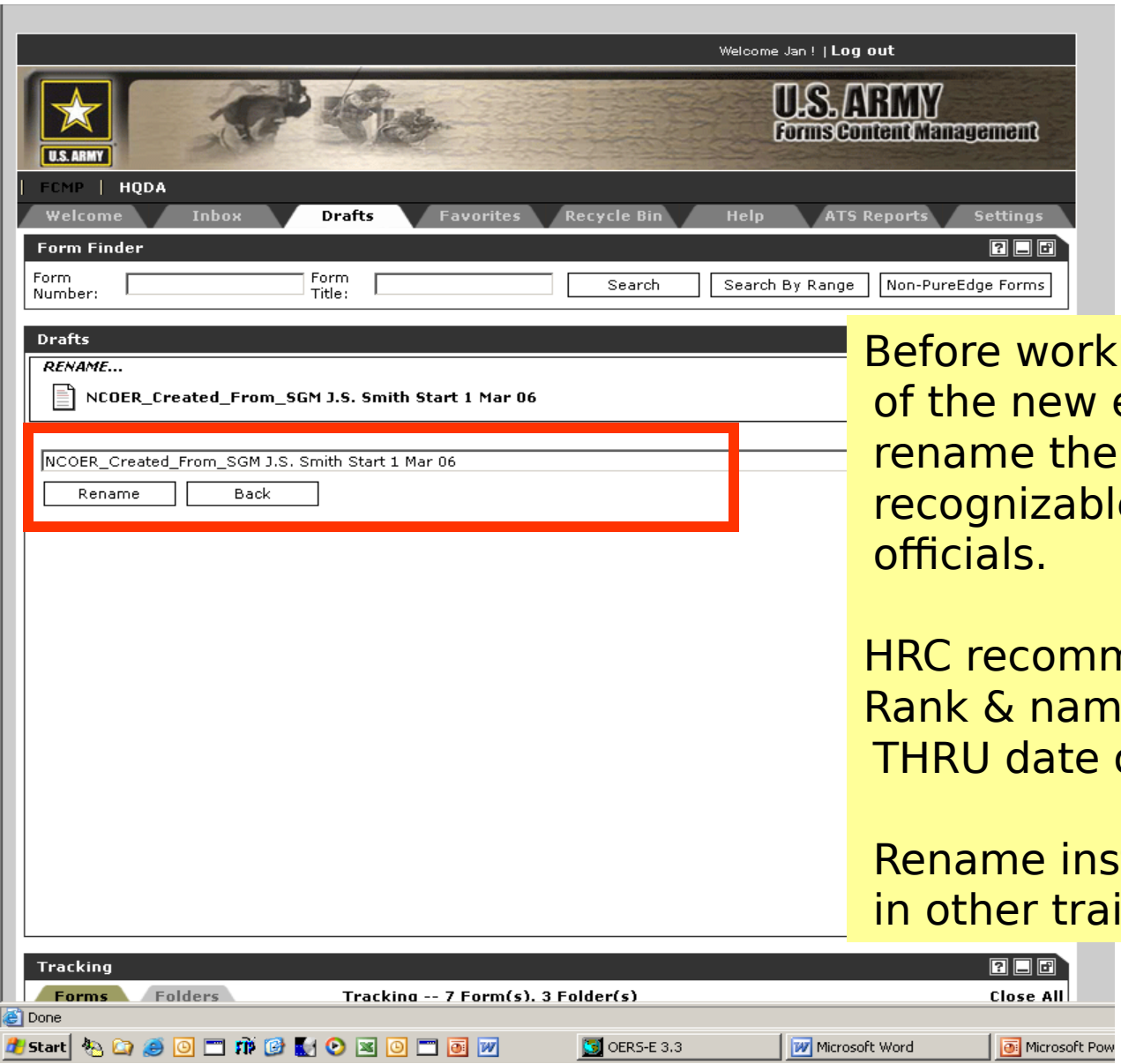


After the system completes processing your action you will receive a response as to whether your action was successful or not.

Regardless of notice type, select CONTINUE.



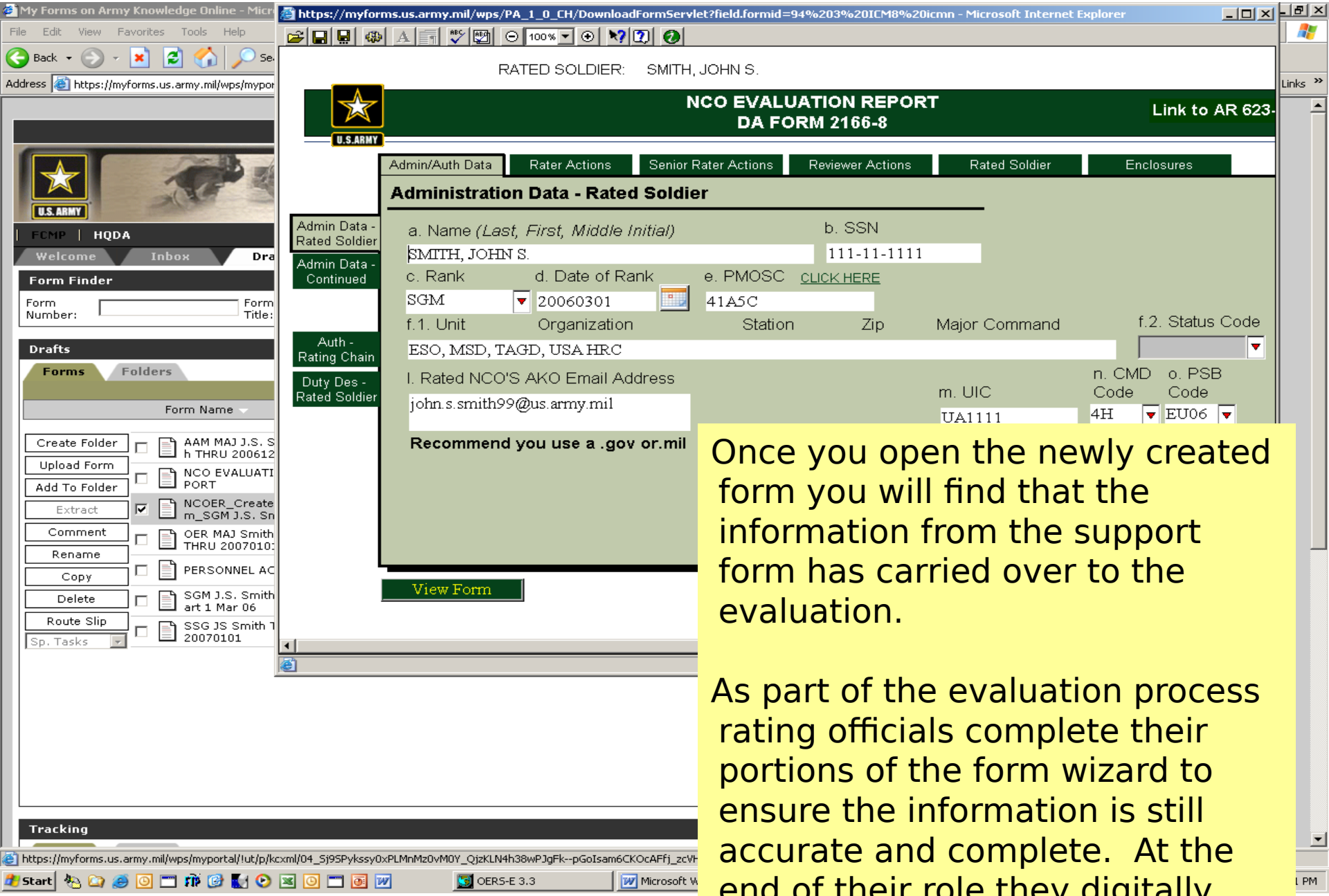
The system will return to the box in which you were working and will reflect the newly created form (highlighted here in red). The originating support form is highlighted in purple.



Before working with the content of the new evaluation it helps to rename the form to something recognizable by all rating officials.

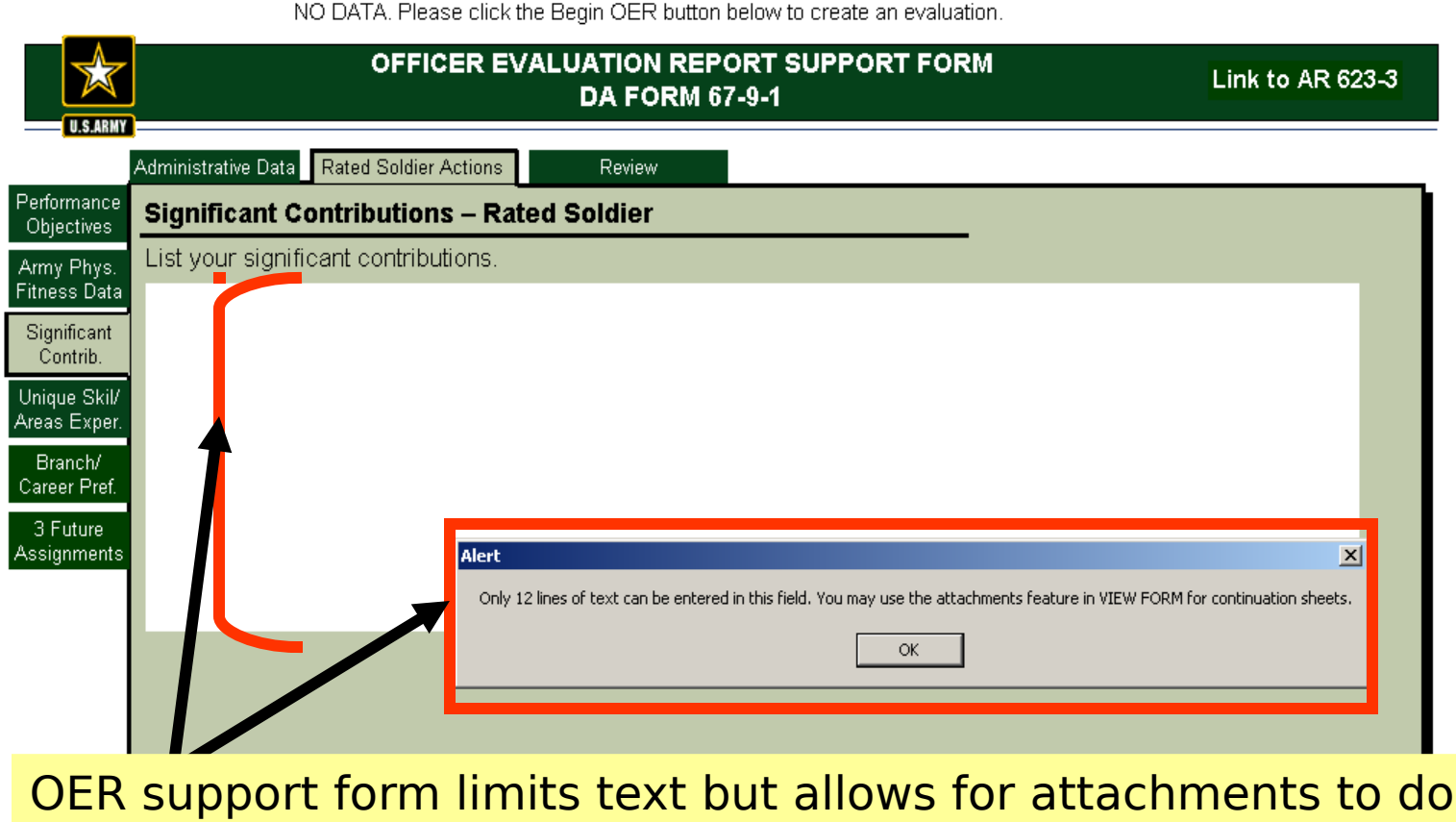
HRC recommends using at least: Rank & name of rated Soldier & THRU date of the report.

Rename instructions are covered in other training slides.



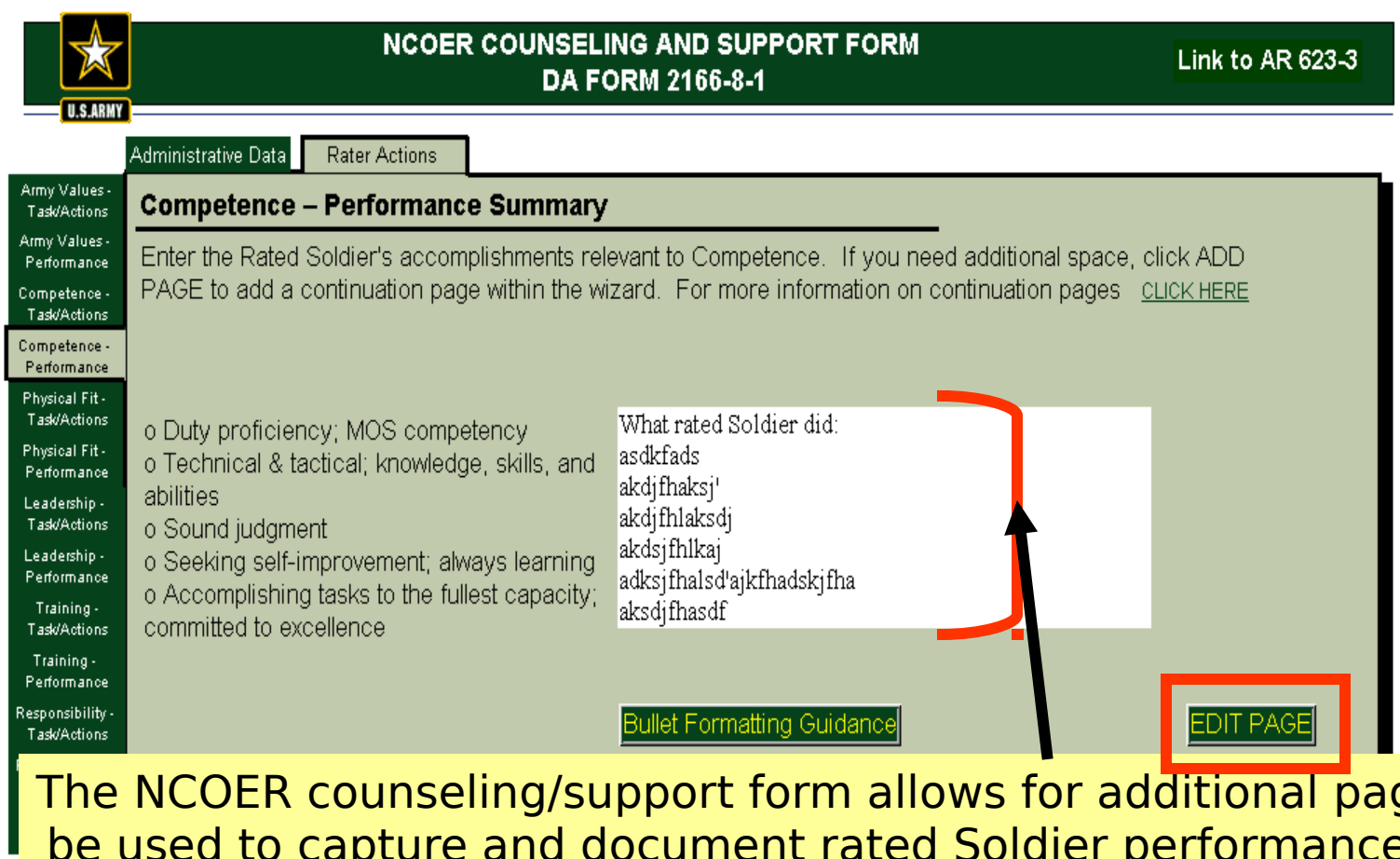
Once you open the newly created form you will find that the information from the support form has carried over to the evaluation.

As part of the evaluation process rating officials complete their portions of the form wizard to ensure the information is still accurate and complete. At the end of their role they digitally sign the report and route


NO DATA. Please click the Begin OER button below to create an evaluation.
OFFICER EVALUATION REPORT SUPPORT FORM
DA FORM 67-9-1
Link to AR 623-3
U.S.ARMY
Administrative Data
Rated Soldier Actions
Review
Performance Objectives
Army Phys. Fitness Data
Significant Contrib.
Unique Skil/ Areas Exper.
Branch/ Career Pref.
3 Future Assignments
Significant Contributions – Rated Soldier
List your significant contributions.
Alert
Only 12 lines of text can be entered in this field. You may use the attachments feature in VIEW FORM for continuation sheets.
OK

OER support form limits text but allows for attachments to document rated officer's accomplishments. Only text visible on the support form itself will transfer to the evaluation automatically. As the support form should accompany the final evaluation during it's preparation the rating officials should review the support form in its entirety (to include the attached pages) to glean relevant information for the final assessment.

FYI: We deliberately limited the space on the support form to that which is available on a final evaluation so this transfer action would not randomly truncate information.


RATED SOLDIER: SMITH, JOHN S.
NCOER COUNSELING AND SUPPORT FORM
DA FORM 2166-8-1
Link to AR 623-3
U.S.ARMY
Administrative Data
Rater Actions
Army Values - Task/Actions
Army Values - Performance
Competence - Task/Actions
Competence - Performance
Physical Fit - Task/Actions
Physical Fit - Performance
Leadership - Task/Actions
Leadership - Performance
Training - Task/Actions
Training - Performance
Responsibility - Task/Actions
Competence – Performance Summary
Enter the Rated Soldier's accomplishments relevant to Competence. If you need additional space, click ADD PAGE to add a continuation page within the wizard. For more information on continuation pages CLICK HERE
o Duty proficiency; MOS competency
o Technical & tactical; knowledge, skills, and abilities
o Sound judgment
o Seeking self-improvement; always learning
o Accomplishing tasks to the fullest capacity; committed to excellence
What rated Soldier did:
asdkfads
akdjfhaksj'
akdjfhlaksdj
akdsjfhlkaj
adksjfhalsd'ajkfhadskjfha
aksdjfhasdf
Bullet Formatting Guidance
EDIT PAGE

The NCOER counseling/support form allows for additional pages which may be used to capture and document rated Soldier performance counseling throughout the evaluation period. Only text visible on the counseling/support form itself in the performance summary blocks will transfer to the evaluation automatically. As the support form should accompany the final evaluation during it's preparation rating officials should review the support form in its entirety (to include additional pages) to glean relevant information for the final assessment. For easy